

Dynamics 365 for Finance and Operations: Business Intelligence Hands on Lab



Maintain

Target Audience:

- The typical audience is composed of data analysts and power users but it is also a valuable experience for IT professionals and BI developers.

Benefits

- Hands-on experience with a Microsoft expert on Dynamics 365 for Finance and Operations BI tools.
- Understand how to leverage Power BI, Power Query, SQL Server Reporting Services, and the Excel Add-in to bring your Finance and Operations data to life.

Overview

In today's business environment, the competitive advantage goes to organizations that can turn data into insightful decisions, quickly. Dynamics 365 for Finance and Operations provides tools to manage resources for organizations that span in size from small businesses to global enterprise conglomerates. The Finance and Operations platform provides a collection of reporting solutions to address the various information access needs of an ERP solution. These tools are designed with flexibility in mind, to accommodate a dynamic world of business.

Through classroom challenging training and hands on labs, learn about Business Intelligence with Dynamics 365 for Finance and Operations and how it can help speed up your decision making and bring your data to life.

This hands-on lab introduces you to the BI tools available with Finance and Operations which include:

- Power BI and Power Query
- SQL Server Reporting Services
- Excel Add-in

The labs will give you real world scenarios to work through on your own Lifecycle Services deployed Dynamics 365 for Finance and Operations environment. These labs are performed against the demo data that is available with your environment.

Technical Highlights

After attending this hands-on lab, you will be able to:

- Understand the different types of BI solutions available and how to use them.
- Understand what solutions are best for each reporting/BI scenario.
- Build your own BI solutions.

Syllabus

Hardware Requirements:

Lab environments for this course are hosted in the cloud.

Additional Requirements:

Fast and reliable internet connectivity to the Microsoft Azure Cloud platform.

This is a two-day hands-on lab, typically scheduled from 9:00AM to 5:00PM.

Syllabus

The first day of the course will concentrate on the Power BI components and the integration with Dynamics 365 for Finance and Operations. Prior knowledge of Power BI is beneficial, but not required.

Times indicated per subject, below, depend on the attendees' experience.

Day 1: Power BI

Module 1: Introduction to Business Intelligence: This module introduces the tools available for Business Intelligence in Dynamics 365 for Finance and Operations.

Module 2: Power BI Introduction: In this module, you will get an understanding of the Power BI Components and how they integrate with Dynamics 365 for Finance and Operations.

Module 3: Shaping Data: In this module, you will be presented with the different options available to transform data.

Module 4: Creating a Data Model: In this module you will learn the different modelling capabilities such as relationships, measures, hierarchies and others.

Module 5: Building Reports: This module covers the different visualizations supported and typical best-practices for using them.

Module 6: Publishing to the Cloud: This module explains the process of publishing the developed model and accompanying reports to the service.

Module 7: Integration with Dynamics 365: This module explains the integration of Power BI with Dynamics 365 for Finance and Operations.

Syllabus

Day 2: SQL Reporting Services and Office Integration

Module 1: Document Reporting Overview: This module introduces SQL Server Reporting Services (SSRS) components in Dynamics 365 for Finance and Operations.

Module 2: Creating Reporting Solutions: In this module, you will get an understanding of what is new in Dynamics 365 for Finance and Operations with regards to SSRS and the key concepts of creating reports.

Module 3: Customizing Reports: In this module, you will learn how to make customizations to reports in Dynamics 365 for Finance and Operations.

Module 4: Building Reports: This module covers how to build SSRS reports in Dynamics 365 for Finance and Operations. This section incorporates a comprehensive lab.

Module 5: Office Integration: This module covers the Office Integration with Dynamics 365 for Finance and Operations. We will concentrate on pulling data into Excel from Dynamics 365 for Finance and Operations.